Planning Profiles

In this edition of *Planning for Library Excellence*, quantitative measures are included in planning profiles. The planning profiles are tools that guide the library in establishing selected, measurable service objectives. As part of the local planning process, individual library boards and staff can establish service objectives that are appropriate to the library's local situation and local needs.

The quantitative measures included in the planning profiles are drawn from the data assembled from the Virginia public library annual reports. These measures are Virginia-specific and reality-based.

Peer Libraries

Although a number of factors should be considered when a library chooses a planning profile, the initial grouping of peer libraries for *Planning for Library Excellence* is based primarily on the current level of service offered by the library. This grouping of peer libraries is used to determine quantitative measures for the planning profile.

The Service Level Index

To group peer libraries by level of service, a Service Level Index (SLI) is used. The SLI focuses on twelve key data elements, or parameters:

- Total Number of Materials
- Total Materials Per Capita
- Circulation
- Circulation Per Capita
- Turnover Rate
- Reference Transactions
- Reference Transactions Per Capita
- Visits
- Visits Per Capita
- Total Operating Expenditures
- Operating Expenditures Per Capita
- Number of Registered Borrowers

A library's statewide ranking on each of the key parameters is averaged. The average ranking is the library's Service Level Index. Libraries with similar SLI's are divided into peer groups, or planning profiles. The SLI is a tool for grouping similar libraries to determine appropriate benchmarks for the profile. When

selecting a planning profile, the library should consider other factors described below.

Parameters, Medians, Second Quartile Median (SQM), Top Quartile Medians (TQM)

Grouping libraries by service level allows quantitative measures to be developed for each planning profile. Parameters, or data elements, from the library's annual statistical report are used. For each parameter, three quantitative measures are determined for each planning profile:

Median:	For each parameter for each profile, the median service level is identified. Half of the libraries in that profile are above the median for that parameter; half are below.
Second Quartile Median(SQM):	For each parameter for each profile, the median of the second highest quartile is identified. In a planning profile of 20 libraries, approximately seven will be above the SQM, and twelve below.
Top Quartile Median (TQM):	For each parameter for each profile, the median of the top quartile is identified. Using a planning profile of twenty libraries, two or three libraries meet or exceed the TQM; the other libraries fall below. The TQM represents excellence for that parameter for that profile.

Local libraries may select parameters on which to focus during the planning process. Once parameters are selected, the library may use either the median, SQM, or the TQM for that parameter as an objective.

Deciding on a Planning Profile

Several factors should be considered as a library chooses a planning profile. In addition to the current level of service, a library should also consider the population and/or density of population of its service area; other demographics of the service area including the diversity of the population; the size of the service

area; the library's level of technology; and the number of service responses or roles adopted by the library.

Planning Profile Characteristics

Profile I	Library Size:	Small
	Setting:	Rural and Towns
	Population:	Low
	Diversity:	Limited
	Level of Service:	Limited
	Service Responses:	1-2
	Outlets:	One Site (Median)
	ALA MLS:	1

Profile II	Library Size:	Small to Medium
	Setting:	Rural and Towns
	Population:	Low to Medium
	Diversity:	Some
	Level of Service:	Limited
	Service Responses:	2-3
	Outlets:	Two (Median)
	ALA MLS:	1

Profile III	Library Size:	Medium
	Setting:	Rural, Towns, Small Cities
	Population:	Medium
	Diversity:	Moderate
	Level of Service:	Medium
	Service Responses:	3-4
	Outlets:	Four (Median)
	ALA MLS:	2 - 4

Profile IV	Library Size:	Medium to Large
	Setting:	Cities and Suburban Counties
	Population:	Medium to High
	Diversity:	Moderate to Extensive
	Level of Service:	Medium to High
	Service Responses:	4-5
	Outlets:	Six (Median)
	ALA MLS:	9 - 24

Profile V   Library Size: Large
          Setting: Urban and Large Suburban Counties
          Population: High
          Diversity: Extensive
          Level of Service: High
          Service Responses: 5 or more
          Outlets: Nine (Median)
          ALA MLS: More Than 30

Using the Planning Profiles

The quantitative measures of Median, Second Quartile Median, and Top Quartile Median included in the planning profiles can be used as the standards and guidelines are used:

- Determining the library's current condition with respect to appropriate parameters.

- Setting targets or objectives for future developments for appropriate parameters.

- Determining if the library achieved its target or objective with respect to appropriate parameters.

In addition, a library can use the planning profile information for comparisons such as:

- The library's service parameters in relation to expenditure and income parameters.
- The library to another library.
- A sub-profile of its planning profile.

As with the standards and guidelines, it is important to remember that the planning profiles are a tool. The library should choose the planning profile that best meets the local situation and local needs. Within the planning profile, the library should work with those parameters that best meet its needs.

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